NILFORGE DIGITAL SOLUTIONS · USER MANUAL

Quote & Estimate Generator

Printable quotes in seconds, plus a pipeline of what you've won.

Version 3.0 · November 2026 · Screenshots show this exact version with sample data.

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1. What it does and who it is for

Service businesses that send quotes and want a printable quote plus a pipeline of won and open work.

Result: In about 10 minutes: your business details set, a quote with lines, and a printable quote ready to save as PDF.

- Pick a quote number and the printable quote fills itself
- Discount, tax and valid-until dates
- Expired quotes flagged automatically
- Warnings shown above the quote, never printed on it

Capacity (tested): 300 quotes, 2,000 lines, 25 lines per printed quote.

2. Requirements and compatibility

Program	Status
Microsoft Excel 2016 or newer (Windows)	Built for it: uses only Excel 2016 functions, no macros. Not yet tested in real Excel by Nilforge.
Excel for Mac	No macros are used. Not yet tested on a Mac.
Google Sheets	Not yet verified: use Excel for now. If you try it, sheet protection does not carry over.

LibreOffice Calc 24+	All calculations are verified against independent models in LibreOffice (automated tests).

3. Clean and demo versions

You receive two files. The **clean** file has no data. Use it for your business. The **_DEMO** file is the same tracker filled with sample data, so you can explore every feature first. Cream cells are for typing. Grey cells calculate automatically and are protected (no password).

4. Set up

1 Open the clean file

Use Nilforge_Quote_Estimate_Generator.xlsx for real data; the _DEMO file shows examples.

2 Settings

Business name, contact details, tax label and rate, default valid days, footer.

Setting	Value	Notes	Check
Business name	Your Business Name	Shown on the quote	
Address / city	City, Region		
Email	you@example.com		
Phone		Optional	
Tax label	Sales tax	e.g. GST, HST, VAT, Sales tax	
Tax rate	0.0%	Enter as a percentage, e.g. 7.25%. Use 0% if you don't	OK
Quote valid for (days)	30	Default when a quote row leaves it blank	
As-of date	11/28/2026	Leave =TODAY() for live status	
Quote footer	Thank you for the opportunity. Prices are valid until the date shown.		
As-of date in use (calculated)	11/28/2026	If the as-of cell is blank or invalid, today's date is used	

5. Everyday tasks

Create a quote

1. Quotes tab: quote #, client, email, date, status, optional discount %.
2. Lines tab: one row per item with the same quote #, quantity, unit and price.

Quote #	Description	Qty	Unit	Unit price	Line total	Line no.	Key	Check
Q-1001	Website landing page design	1	page	$650.00	$650.00	1	Q-1001|1	OK
Q-1001	Copywriting	4	hrs	$55.00	$220.00	2	Q-1001|2	OK
Q-1002	Booking spreadsheet setup	1	each	$300.00	$300.00	1	Q-1002|1	OK
Q-1002	Staff training	2	hrs	$60.00	$120.00	2	Q-1002|2	OK
Q-1003	Patient reminder automation	1	each	$480.00	$480.00	1	Q-1003|1	OK

Print or save the quote as PDF

1. Quote tab: pick the quote # in the yellow cell.
2. Warnings appear in red above the page and are never printed.
3. File > Print (or Save as PDF).

Select quote #: Q-1004

Your Business Name

City, Region · you@example.com

QUOTE

Quote #	Q-1004
Date	11/10/2026
Valid until	12/10/2026
Status	Sent

Prepared for

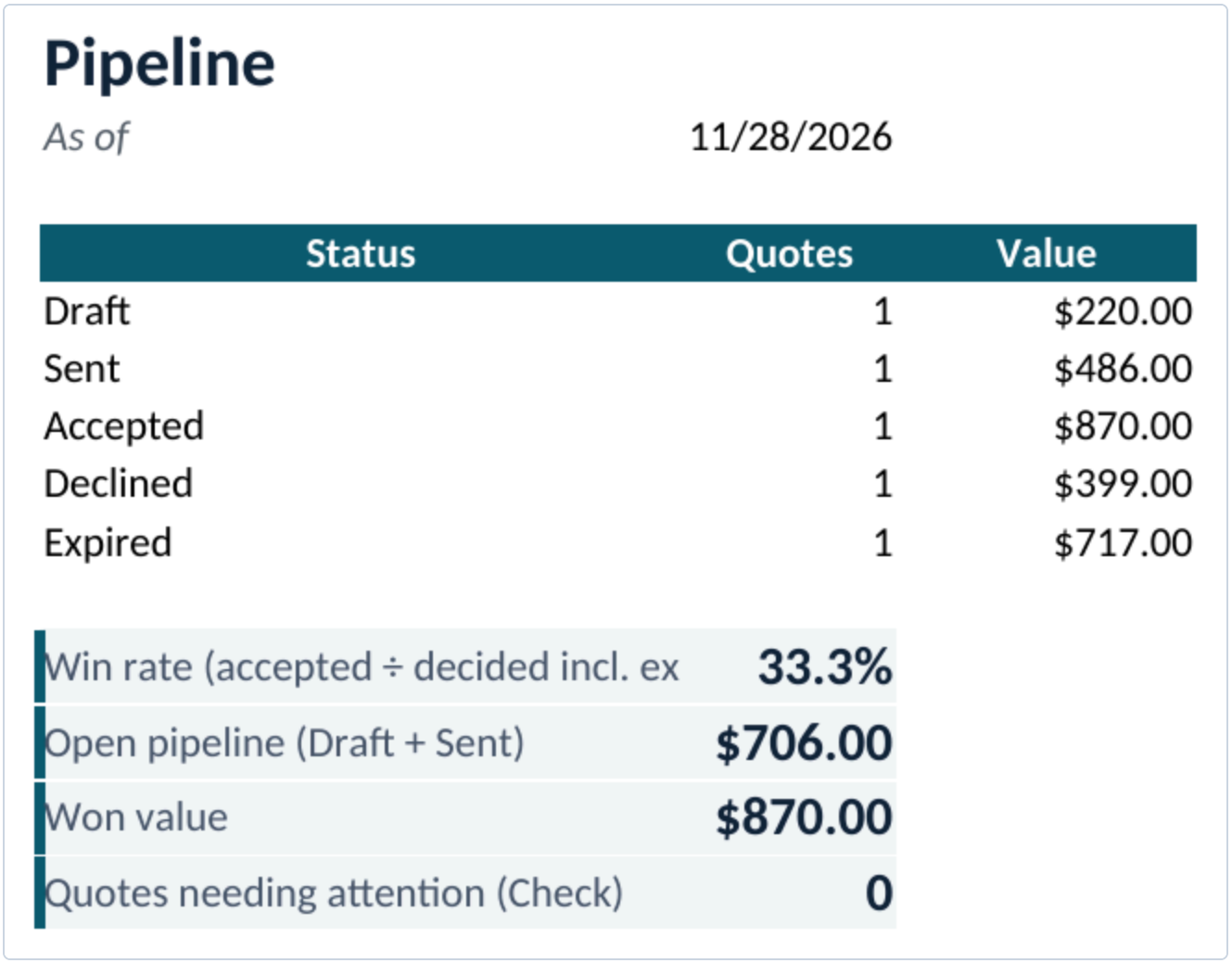
North Trail Media (SAMPLE)

hello@northtrail.example

Description	Qty	Unit	Unit price	Amount
Video project tracker	1	each	$260.00	$260.00
Dashboard	1	each	$180.00	$180.00
Revisions	2	hrs	$50.00	$100.00

Track the pipeline

1. Pipeline tab: count and value by status, win rate and open pipeline.



Pipeline

As of 11/28/2026

Status	Quotes	Value
Draft	1	$220.00
Sent	1	$486.00
Accepted	1	$870.00
Declined	1	$399.00
Expired	1	$717.00

Win rate (accepted ÷ decided incl. ex	**33.3%**
Open pipeline (Draft + Sent)	**$706.00**
Won value	**$870.00**
Quotes needing attention (Check)	**0**

6. Status meanings

Status	Meaning
Draft	Not sent yet (blank status counts as Draft).
Sent	Sent and still valid.
Accepted	Won.
Declined	Lost.
Expired	A Draft or Sent quote past its valid-until date.

7. Check messages and how to fix them

Every data tab has a **Check** column. It says OK, or names the problem. Dropdowns block most typing mistakes. Pasted values skip dropdown rules, so the Check column is your safety net. Until you fix them, flagged rows can make totals wrong.

Message	What to do
A line needs attention	Open the Lines tab and fix the line whose Check is not OK.
Add a date (needed for expiry)	Type the quote date.
Add the quote #	Type the quote number on the line.
Discount must be 0%–100% (e.g. 10%); not applied	Type the discount as a percentage (10%), not 10. Until fixed, no discount is applied.
Duplicate quote #	Each quote number must be unique.
Fix before sending:...	Shown above the printable quote: fix the problem named after it before sending.
No lines yet	Add at least one line on the Lines tab with this quote #.
Price must be a number	Type the unit price as a number.
Qty must be a number	Type the quantity as a number.
Quote # not in Quotes	Create the quote on the Quotes tab first, or correct the number.
Tax rate looks wrong: use a % such as 13%	In Settings, type the rate as a percentage (13%).
Total is negative: check prices	Negative line prices outweigh the rest. Check the lines.
Unknown status: use Draft, Sent, Accepted or Declined	Pick a status from the dropdown.
◀ Quote # not found: pick one from the list	Pick an existing quote number in the yellow cell.
Qty cannot be negative	Type a positive quantity. For a discount, use the quote's Discount % or a line with a negative unit price.
Taxable? must be Yes, No or blank	Lines: choose Yes (taxed), No (exempt or zero-rated) or leave it blank (Yes).

8. FAQ

How many lines fit on a printed quote?

25. Extra lines are counted in the totals and a warning (not printed) tells you.

Can I add my logo?

Yes: Review > Unprotect sheet on the Quote tab, then Insert > Picture.

Limits?

300 quotes and 2,000 lines per file (tested).

Can I show prices including tax (UK/EU/Australia style)?

Yes: Settings > 'Prices include tax?' = Yes. Unit prices are then treated as tax-inclusive and the quote shows the tax included.

Some lines aren't taxable. What do I do?

Lines tab: set 'Taxable?' to No on those lines. Tax is worked out on the taxable lines only.

Which edition (currency) should I use?

The download includes Canada, US, UK, Australia, EU and Universal editions. They differ only in currency symbol, date display and (Quotes) default tax name and rate; pick the one for where you work.

9. Troubleshooting

Problem	Fix
The Dashboard is blank when the file opens	Click **Enable Editing** (Excel Protected View). The numbers then calculate.
I can't type in a cell	Grey cells are protected calculations. Type only in cream cells. To change a formula: Review > Unprotect sheet (no password).
A dropdown rejects my entry	Add the item to its list first (e.g. the Clients or Categories tab), then pick it.
Dates show as numbers	Home > Number > Short Date.
Printing shows many blank pages	Print areas cover the full capacity, so no data is ever cut off. Filter out blank rows first (Data > Filter, untick Blanks), then print.
Totals look too low	Look at "Rows needing attention" on the Dashboard. Rows with a Check message can make totals wrong. Fix each flagged row (the message changes to OK).
I deleted a whole row and see #REF!	Use Undo (Ctrl+Z). If that's too late, copy the formulas down from the row above, or start again from the clean file. Always clear cells instead of deleting rows.

10. Backup, recovery and updates

- Save a dated copy each month (File > Save As, e.g. tracker_2026-11.xlsx). Keep one copy outside your computer (cloud drive or USB).
- To recover, open the latest copy. If a file is damaged, paste your cream-cell data into a fresh clean file.
- Updates: bug-fix versions are free through your Payhip download link. To move to a new version, copy your cream-cell data (values only: Paste Special > Values) into the new clean file, tab by tab.

11. Licence

For personal use, or use within one business. Do not resell or redistribute the file or its parts. © Nilforge Digital Solutions. This is an organisational tool, not accounting, tax or legal advice.

12. Support

Email **nilforge@gmail.com** with the product name, your program (Excel version) and a screenshot. Replies take up to 2 business days. If the file does not work as described, tell us within 14 days of purchase and we fix it or refund you in full. Custom changes are a paid service.

Manual for version 3.0, generated 2026-11-28 from the verified product specification. Screenshots are real renders of this version.